



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF THE ASSISTANT SECRETARY FOR POSTSECONDARY EDUCATION

MAY 1989

GEN-89-30

SUMMARY: List of Certified Need Analysis Systems that may be used to produce an accurate expected family contribution (EFC) for the 1989-90 processing year under the Perkins Loan, College Work-Study (CWS), Supplemental Educational Opportunity Grant (SEOG), Income Contingent Loan (ICL), and Stafford Loan Programs as authorized by Part F of Title IV of the Higher Education Act of 1965, as amended (HEA).

FEDERAL STUDENT FINANCIAL AID HANDBOOK REFERENCE: Please refer to Chapter 2, Section 3 of the 1989-90 Federal Student Financial Aid Handbook for further information.

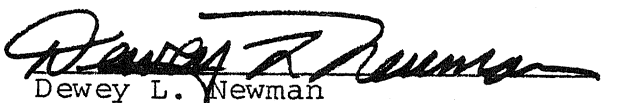
Dear Colleague:


The purpose of this letter is to inform you that the Secretary of Education has certified 57 Need Analysis Systems for the 1989-90 processing year. Institutions of higher education may use these certified systems in calculating a student's EFC during the 1989-90 processing year under the Perkins Loan, CWS, SEOG, ICL, and Stafford Loan programs.

An institution is not required to use a certified need analysis system. However, if an institution uses a certified need analysis system in the calculation of an EFC for the 1989-90 processing year under the Perkins Loan, CWS, SEOG, ICL, and Stafford Loan programs, the institution can be assured that the EFC produced by the system will accurately reflect the EFC provided under Part F of Title IV of the HEA.

If you have questions about the contents of this letter, please call 800-333-INFO.

Sincerely,


Dewey L. Newman
Deputy Assistant Secretary for
Student Financial Assistance


William L. Moran
Director, Student
Assistance Program

Enclosure

Program Information

The Perkins Loan, College Work-Study (CWS), and Supplemental Educational Opportunity Grant (SEOG) programs, known collectively as the campus-based programs, and the Stafford Loan Program are "need-based" student financial aid programs. In order to award financial aid under each program, an institution must determine whether a student has financial need. The institution determines a student's financial need by subtracting from the student's educational costs his or her expected family contribution (EFC), i.e., the amount the student, his or her spouse and, in the case of a dependent student, his or her parents, may reasonably be expected to contribute toward his or her educational costs.

Institutions participating in the Income Contingency Loan (ICL) Demonstration Project must make ICLs reasonably available first to all eligible students who demonstrate financial need.

Part F of Title IV of the Higher Education Act of 1965, as amended (HEA), provides detailed formulas for determining a student's EFC for the campus-based, Stafford Loan and ICL programs. The statutory formulas specify the criteria, data elements, and tables for EFCs for these programs.

As authorized by the HEA and as a service to participating institutions, the Secretary certifies that an EFC produced by a Need Analysis System (NAS) listed here accurately reflects the EFC prescribed by the HEA.

Types of NAS Systems

The Secretary developed eight types of NASs to accommodate the various types of services offered to institutions. Types do not differ in the EFC calculations, which are standard and valid in all types, but in how they prepare the data to be calculated. Each type includes edits to determine dependency status and an EFC calculation. A type's higher number does not mean better calculations or necessarily better service to schools and students. A type's suitability can be measured only by an institution which, after an assessment of its needs, chooses a servicer who offers the best match of service. Some types are more easily adapted to batch (data or jobs being processed in a single program run) systems, and are, therefore, more appropriate for certain schools; some schools prefer interactive (face-to-face) situations, and therefore, prefer a different type. The quality of data may in some instances be better in a lower type system where an applicant is face to face with the Financial Aid Administrator (FAA). The FAA can question an applicant when it is evident that he or she has entered conflicting or incorrect data on the application. On the other hand, this approach is less appropriate where a large volume of applications dictates batch processing. Conservative assumptions about data are

allowed in batch processing. There is a lesser need for assumptions in interactive systems.

Descriptions and Examples of Types

Systems certified as Types 1, 2, and 3 compute an EFC and make a varying number of assumptions to allow the processing of applications even though some data may be missing that are essential to the calculations. Type 1 generally requires complete data, but will default to minimum values for a limited number of data fields. An example of an assumption by default under Type 1 is as follows: An applicant did not respond to "Parent is a dislocated worker" and has left the data field blank. The system would default to "No".

Type 2 uses a few basic assumptions to determine values that the applicant has left blank or answered inconsistently, by using one of the other data fields in its evaluation. An example of a basic assumption under Type 2 is as follows: An applicant left the response to parents' marital status blank and listed the number of family members as two. The system assumes that the parents' marital status is "Unmarried".

Type 3 was designed to use the complete set of assumptions used by the Federal Central Processor and includes edits to evaluate the reasonableness of information reported. An example of a complete assumption under Type 3 is as follows: An applicant left the response to Adjusted Gross Income (AGI) blank or answered zero, the parent is a tax filer, and the father's income or the mother's income is positive or negative. The assumption would be that the AGI is equal to the sum of the parents' earnings. No system applied to be certified as Type 3 for the 1989-90 processing year.

Systems certified as Types 4, 5, and 6 compute an assumptions as in Types 1, 2, and 3, and income verification edits. The verification edits are used to select an applicant for verification. The criteria are determined as follows: Education; the criteria are based on criminal record and correction behavior and are used to select an applicant for verification. Type 4 is the same as Type 1 except for the verification edits. Type 5 is the same as Type 4 except for the verification edits. Type 6 is the same as Type 5 except for the verification edits.

Type 7 was designed to compute an EFC and make a varying number of assumptions which check for inconsistencies and incorporate the verification edits. No system was certified as Type 7 for the 1989-90 processing year.

Systems certified as Type 8 compute an EFC and make a varying number of assumptions to allow the processing of applications even though some data may be missing that are essential to the calculations.

complete assumptions, incorporate the verification edits, and incorporate the reject reasons.

Multiple Data Entry (MDE) Processors (only) were certified as Type 9. Type 9 is the same as Type 8 except that it includes a few additional edits.

List of Certified Systems for the 1989-90 Processing Year

The Secretary certifies the following Need Analysis Systems for the following Types for the 1989-90 processing year:

Type 1

HESC-ABLE 1989-90
NYS Higher Education Services Corporation
99 Washington Avenue, Room 1438
Albany, New York 12255
(518) 474-8336

JaFAa
Janet's College Tuition Aid
Counseling Service
187 Monroe Street
Massapequa Park, New York 11762
(516) 798-1762

RCN Need Analysis
Regents Computer Network
150 Causeway Street
Boston, Massachusetts 02114
(617) 727-9500

Type 2

COLLEAGUE (tm)
Datatel, Inc.
4375 FairLakes Court
Fairfax, Virginia 22033
(703) 968-9000

Type 4

Academic Information Management System (AIMS)
The Aims Group, Inc.
6501 Park of Commerce Blvd., Suite 220
Boca Raton, Florida 33487
(407) 994-0982

AllCalc
The American College Testing Program, Inc.
2255 North Dubuque Road, P.O. Box 168
Iowa City, Iowa 52243
(319) 337-1231

ATLANTA STUDENT AID - "CALCPLUS"

Atlanta Student Aid
5037 Bell Drive
Smyrna, Georgia 30080
(404) 434-3445

CSA Series 1000, Financial Aid Calculator
Calculator Systems Associates
1426 West Sixth Street, Suite 206
Corona, California 91720
(714) 734-3818

CSA Series 5000, Financial Aid Calculator
Calculator Systems Associates
1426 West Sixth Street, Suite 206
Corona, California 91720
(714) 734-3818

CSA Series 6000, Financial Aid Calculator
Calculator Systems Associates
1426 West Sixth Street, Suite 206
Corona, California 91720
(714) 734-3818

KISS N.A.S.
KISSoftware, Inc.
1011 Centre Road, Suite 102
(Delle Donne Corporate Center)
Wilmington, Delaware 19805
(302) 633-0600

Type 5

Colleague (tm)
Datatel, Inc.
4375 FairLakes Court
Fairfax, Virginia 22033
(703) 968-9000

Type 6

Administrator (Traditional & Proprietary,
EDTECH, Inc.
13464 Northland Drive
Big Rapids, Michigan 49307
(616) 796-8641

CSA PC Disk, Need Analysis System
Calculator Systems Associates
1426 West Sixth Street, Suite 206
Corona, California 91720
(714) 734-3818

CSA Series 1000, Financial Aid Calculator
Calculator Systems Associates
1426 West Sixth Street, Suite 206
Corona, California 91720
(714) 734-3818

CSA Series 6000, Financial Aid Calculator
Calculator Systems Associates
1426 West Sixth Street, Suite 206
Corona, California 91720
(714) 734-3818

Electronic Need Analysis System (ENAS)
U.S. Department of Education
400 Maryland Avenue, SW
ROB-3, Room 4004
Washington, D.C. 20202
(202) 732-3963

National Education Centers
National Education Centers
1732 Reynolds
Irvine, California 92614
(714) 261-7606

Type 8

ACS-FAMS (Financial Aid Management)
Academic Computing Systems
3431 North Hills Drive, Suite 223
Austin, Texas 78731
(512) 343-7325

Brittain 8
Brittain Systems, Inc.
5521 Greenville Avenue
Suite 104-252
Dallas, Texas 75206
(214) 691-6535

CARS Administrative Computer System
CARS Information Systems Corporation
4000 Executive Park Drive
Cincinnati, Ohio 45241
(513) 563-4542

City University of New York
Financial Aid Processing System
City University of New York
101 West 31st Street, 7th Floor
New York, New York 10001
(212) 947-6000

CLASS v 1.0
Creative Computer Technologies, Inc.
6401 Congress Avenue, Suite 205
Boca Raton, Florida 33487
(407) 241-4344

COLLEGIATE DATA SYSTEMS--SYSTEM 8
COLLEGIATE DATA SYSTEMS
3909 Valley Stream Drive
Raleigh, North Carolina 27604
(919) 833-4517

Director's Assistant Need Analysis Calculator
United Education and Software
3600 South Minnesota Avenue
Sioux Falls, South Dakota 57105
(605) 339-3788

Eddge III+ Needs Analysis
DFAS, Inc.
1740 Emerson Street
Denver, Colorado 80218
(303) 832-7520

EGA Super-Comp Needs System
Earle, Grovatt & Assoc., Inc.
356 Main Street
Matawan, New Jersey 07747
(201) 290-9050

ELectronic Needs Analysis System (ELNAS)
E.D.S. FEDERAL CORPORATION
3215 Prospect Park Place
Rancho Cordova, California 95670
(916) 636-4214

FARE
EDTECH, Inc.
13464 Northland Drive
Big Rapids, Michigan 49307
(616) 796-8641

FASTAID
FAST, Inc. & Donald G. Watson
4015 East Ashlan
Fresno, California 93726
(209) 222-6564

FASTCASH

FAST, Inc. & Donald G. Watson and Associates
4015 East Ashlan
Fresno, California 93726
(209) 222-6564

FASTNEED

FAST, Inc. & Donald G. Watson and Associates
4015 East Ashlan
Fresno, California 93726
(209) 222-6564

GAPSFAS Need Analysis Assistant

Educational Testing Service
Mailstop 01-P
Rosedale Road
Princeton, New Jersey 08451
(609) 734-5955

Graduate and Professional School Financial Aid Service

Educational Testing Service
Mailstop 01-P
Rosedale Road
Princeton, New Jersey 08451
(609) 734-5955

INAS, The Institutional Need Analysis System

College Scholarship Service
The College Board
2099 Gateway Place, Suite 480
San Jose, California 95110
(408) 288-6800

IRIS Needs Analysis Package

Software Research Northwest, Inc.
17710 - 100th Avenue SW
Vashon Island, Washington 98070
(206) 463-3030

KISS N.A.S.

KISSoftware, Inc.
1011 Centre Road, Suite 102
(Delle Donne Corporate Center)
Wilmington, Delaware 19805
(302) 633-0600

MICRO-FAIDS

College Scholarship Service
The College Board
2099 Gateway Place, Suite 480
San Jose, California 95110
(408) 288-6800

Mitchell Sweet and Associates
Need Analysis System
Mitchell Sweet and Associates
1626 South Edward Drive
Tempe, Arizona 85281
(602) 968-2900

NEED/3000
Computing Options Company
182 Thomas Johnson Drive
Suite 201
Frederick, Maryland 21701
(301) 662-5592

NEED-LINK
EDTECH, Inc.
216 East 25th Street, Box 640
Kearney, Nebraska 68848
(308) 234-9700

PHEAA Aid Packaging System
Pennsylvania Higher Education
Assistance Agency
School Services
660 Boas Street
Harrisburg, Pennsylvania 17102
(717) 257-2750

PHEAA Need Analysis and Packaging System
Pennsylvania Higher Education
Assistance Agency
School Services
660 Boas Street
Harrisburg, Pennsylvania 17102
(717) 257-2750

ReCalc
The American College Testing Program
2255 North Dubuque Road, P.O. Box 1
Iowa City, Iowa 52243
(319) 337-1231

RGM Aid Management System (tm)
R. Gonzalez Management, Inc.
3409 W. Jefferson Blvd.
Los Angeles, California 90018-3231
(213) 732-0573

RGM FREE Instant Need Analysis System (tm)
R. Gonzalez Management, Inc.
3409 W. Jefferson Blvd.
Los Angeles, California 90018-3235
(213) 732-0573

RGM Local Aid Management System (tm)
R. Gonzalez Management, Inc.
3409 W. Jefferson Blvd.
Los Angeles, California 90018-3235
(213) 732-0573

SAFE
INFORMATION AND COMMUNICATIONS, INC.
5601 La Jolla Blvd.
La Jolla, California 92037-7524
(619) 454-9765

SAM - Student Aid Management System
Sigma Systems, Inc.
1508 Cotner Avenue
Los Angeles, California 90025-3376
(213) 477-1421

SNAP II (Traditional & Proprietary)
EDTECH, Inc.
13464 Northland Drive
Big Rapids, Michigan 49307
(616) 796-8641

Student Aid Reporting and Analysis (SARA)
The American College Testing Program, Inc.
2255 North Dubuque Road, P.O. Box 168
Iowa City, Iowa 52243
(319) 337-1231

Whiz App
USA Funds, Inc.
P.O. Box 50827
Indianapolis, Indiana 46250
(317) 576-1160

Whiz Kid
USA Funds, Inc.
P.O. Box 50827
Indianapolis, Indiana 46250
(317) 576-1160

Type 9 (Multiple Data Entry)

ACT Student Need Analysis Service (SNAS)
The American College Testing Program, Inc.
2255 North Dubuque Road, P.O. Box 168
Iowa City, Iowa 52243
(319) 337-1378

AFSSA (Application for Federal & State Student Aid)
Illinois State Scholarship Commission
106 Wilmot Road
Deerfield, Illinois 60015
(312) 948-8500

College Scholarship Service/College Board
Need Analysis System
College Scholarship Service
The College Board
45 Columbus Avenue
New York, New York 10023
(212) 713-8171

Multiple Data Entry System
Pennsylvania Higher Education
Assistance Agency
PHEAA
660 Boas Street
Harrisburg, Pennsylvania 17102
(717) 257-4029